CCQAS 2.8

TRAINING MANUAL

First Edition (2006)

CCQAS 2.8 Training Manual Table of Contents

Total = 135 pages plus 20 tabs and color cover insert

LESSON 1: Configuring the List of Facility-Supported Privileges

Background: Prior to using CCQAS 2.8 electronic privileging functions, the complete list of privileges supported by the facility or unit must be configured.

Objective: To practice designating privilege items as "Supported" or "Not Supported" for a selected specialty in CCQAS 2.8.

Exercise:

Step 1: Select a specialty for this exercise: _____.

Step 2: Log on to CCQAS as the CC/MSSP/CM, with the userid and password that have been supplied to you: _____.

    Note: The password is case-sensitive and should be entered using the [Shift] key and not the [Caps Lock] key. The userid is always upper case.

Step 3: Click on the Privileging main menu and select "Privilege Management."

Step 4: On the "MTF Privilege Management" screen, open the pick list for **Privilege Category:** and click on the specialty selected in Step 1. The screen will refresh and display the privilege list(s) for the selected specialty.

Step 5: Examine the list of privilege items. Each item will default to "Not Supported." For each privilege item that is supported at your facility or unit, click the corresponding radio button for "Supported.**"**

    Note: All privilege items in one folder may be simultaneously designated as "Supported" by clicking the header labeled "Supported."

Step 6: After all privilege items have been reviewed and configured, click <**Save**>.

Step 7: To view the audit trail for a privilege item, select one of the privilege items that was designated as "Supported**.**" Click on the icon to the left of the privilege description to open a hidden menu. Select the "View Privilege" menu item. The Privilege Audit Trail shows the date and time stamps of all changes made to the privilege item, and the individual who made the change. Click <**Close**> to return to the "MTF Privilege Management" screen.

Step 8: Log off of CCQAS by clicking <**Logoff**> in the upper right corner of the screen.

END OF LESSON

This page intentionally left blank.

LESSON 2: Completing and Submitting the 1st E-Application

Background: CCQAS 2.8 enables each Provider to complete and submit an electronic application for clinical privileges.

Objective: To practice using the CCQAS 2.8 self-service function by completing and submitting an e-application for clinical privileges for a fictitious Provider.

Exercise:

Step 1: Log on to CCQAS as a Provider with the userid and password that have been supplied to you: _____.

> *Note:* The password is case-sensitive and should be entered using the [Shift] key, not the [Caps Lock] key. The userid is always upper case. At the first log on, you will be presented with a security briefing. Click <**Yes I Understand**> and then <**Submit**>.

Step 2: Review the work list to verify the presence of a task to "*Complete Application (Military)* or (*Civilian).*" Double-click on the task to open the application form.

Step 3: Review the on-screen instructions and the explanation of each icon. Click on "Profile/Position" on the navigation bar to begin completing the application.

> *Note:* Although the instructions indicate that sections may be completed in any order, providers are strongly advised to complete the sections in the order listed, when completing the e-application for the first time.

Step 4: On the "Profile" tab, enter demographic information for a **Military** provider. Click <**Save**> at the top of the screen. The screen will refresh to the "Position" tab. Enter **Provider Category** = *Physician* or *Dentist*. Select *Yes* for **Are you requesting privileges at this time?**. Designate the "Type of Privileges Requested," the "Type of Appointment Requested," and populate the remaining fields on the screen. Click <**Save**>.

Step 5: Click on "Identification" on the Navigation bar. Confirm that the provider's SSN is already documented in this section. Additional identification records may be added by clicking <**Add**>.

Step 6: Click on "Contact Information" on the Navigation bar. On the Address tab, click <**Add**> to add a contact address to the application. Click on the "Email" tab and the "Phone" tab to view the email and phone information that was used to create the CCQAS user account for the provider. Additional identification records may be added by clicking <**Add**>.

Step 7: Click on "Lic/Cert/Reg" on the Navigation bar. Click <**Add**> to enter one state license.   Enter the required information and click <**Save**>. Additional licenses may be entered by repeating this action.

Step 8: Click on "DEA/CDS" on the Navigation bar. Click <**Add**> to enter one DEA certification.   Enter the required information and click <**Save**>.

Step 9: Click on "Education/Training" on the Navigation bar. On the "Professional Education" tab, click <**Add**>. Enter all required information for **Type** = *Qualifying Degree* (e.g., MD, DO, or DDS). Click <**Save**>.   On the "Post Graduate Training" tab, click <**Add**>. Enter one record for a year of post graduate training (e.g., PGY-1, PGY-2, etc.). Click <**Save**>. Additional post-graduate training records may be added by clicking <**Add**>.

 Step 10: Click on "Specialty" on the Navigation bar. Click <**Add**>. Enter all required information for a specialty in which the provider's **Level** = *Board Certified*. Click <**Save**>. Click <**Add**> again.   Enter all required information for a 2nd specialty in which the provider's **Level** = *Fully Trained*. Click <**Save**>.

Step 11: Click on "Affiliations" on the Navigation bar. On the "Malpractice Insurance" tab, click <**Add**>.   Enter all required information for the malpractice insurance that enables the provider to work off-duty in a civilian facility. Click <**Save**>. On the "Clinical Affiliations" tab, click <**Add**>.   Enter all required information for the provider's current, off-duty employment. Click <**Save**>. [For this lesson, you may skip the "Academic Affiliations" tab and the "Organizational Memberships" tab.]

Step 12: Click on "Continuing Education" on the Navigation bar. Click <**Add**>. Enter all required information for one continuing education course. Click <**Save**>.

Step 13: Click on "Contingency Training" on the Navigation bar. Click <**Add**>. Enter all required information for a current Basic Life Support (BLS) certification. Click <**Save**>. Click <**Add**> again. Enter all required information for a C4 certification. Click <**Save**>.

Step 14: Click on "Practice History Questions" on the Navigation bar. Respond to each question. Enter *Yes* for one of the questions, and click on the notes icon (🗋) to enter explanatory text. Click <**Save**>.

Step 15: Click on "Health Status Questions" on the Navigation bar. Respond to each question. Enter *Yes* for one of the questions, and click on the notes icon (🗋) to enter explanatory text. Click <**Save**>.

Step 16: Click on "References" on the Navigation bar. Click <**Add**>. Enter information for a "Current" professional reference. Click <**Save**>. Repeat this process to enter the Service-specific number of required current references into the application.

Step 17: Click on "Privileges" on the Navigation bar. Check the **Privilege Category** that was configured during Lesson 1. Click <**Save**>. On the "Privileges" tab, request some privileges as *Fully Competent* or *With Supervision* and leave other privileges as *Not Requested*. Click <**Add Privilege**> to search for and add a privilege to the list of requested privileges. Click on arrow to left of selected privilege to add and click <Add Privilege>. [Check bottom of privileges screen for added privilege.] Click <**Save**>.

Step 18: Click on "Summary Report" on the Navigation bar. A summary of all data entered into the application will be returned. Review the summary report.

Step 19: Click on "Application Packet" on the Navigation bar. A pdf file of the application will be generated. Review and then close the pdf file.

Step 20: Click on "E-Signature" on the Navigation bar. Review the "Attestation Statement" and then enter the Provider's password to e-sign the application. Enter a comment into the application. Click <**I Agree**>. A warning message will be returned asking the Provider to review all sections of the e-application prior to e-signature. After review, click <**OK**>.   A second message will be returned, indicating that the application has been submitted successfully. Click <**OK**>.

Step 21: Log off of CCQAS by clicking <**Logoff**> in the upper right corner of the screen.

END OF LESSON

This page intentionally left blank.

LESSON 3: Registering for a New User Account in CCQAS as a Reviewer

Background: Every staff member who actively participates in the privilege review and approval process must have a unique user account that provides the appropriate level of access to the CCQAS application.

Objective: To request a CCQAS user account in the CCQAS 2.8 application via the self-service registration function.

Exercise:

Step 1: Go to the URL for the "live" CCQAS application: https://ccqas.csd.disa.mil.

Step 2: Click <**Registration**>. The "Registration" screen will be returned.

Step 3: In the "System Request" portion of the screen, select **User Type:** = *Other (Module Users)* and **Access:** = *Privileging* module.

Step 4: Click the binoculars icon (🔍) to initiate a search for the privileging UIC where you will be using CCQAS to participate in the privilege review process.

> *Hint:* When searching for UICs, it is easiest to search by a combination of Service and MTF State, or partial UIC designation (if known). Avoid use of MTF Name, MTF Address, and MTF City, since these may not be intuitive and may confuse the search effort. Click <**Search**>.

Step 5: Complete the "User Information" portion of the screen by entering your actual name, birth date, and contact information. Army users <u>must</u> enter an AKO email address.

> *Note: Other (Module Users)* are not required to enter **Person ID Type** or **Person ID**. These fields may be left blank.

> *Note:* It is imperative that the email address be entered correctly on the form. Notifications containing your new userid and password will be sent to this email address.

Step 6: Complete the "Registration Validation" section of the form, entering information for the individual who can verify your need for access to CCQAS. Click <**Process>**. CCQAS will return a confirmation message which may either be printed or closed.

Step 7: Click <**Close**> to return to the "Logon" screen.

END OF LESSON

This page intentionally left blank.

LESSON 4: Receipt and Review of the 1st E-Application

Background: After the provider e-signs the e-application, CCQAS electronically forwards the application to the credentials/professional affairs office, where one CC/MSSP/CM will take responsibility for processing the application.

Objective: To practice receiving and reviewing the 1st e-application for clinical privileges for a fictitious Provider.

Note: The e-application that was completed on Day 1 should be used for this exercise.

Exercise:

Step 1: Log on to CCQAS as the CC/MSSP/CM.

Step 2: Review the work list to verify the presence of the "Task = "*Application Ready for Review*." Double-click on the task.

Step 3: Take responsibility for processing the application by clicking <**Yes**>.

Step 4: Review the "Provider Summary" tab. Click <**View Credentials**> near the bottom left-hand side of the screen. Examine each section. Add a note by clicking on the empty note icon (🗋) for one of the sections. Once a note is added, click <**Submit**>. The icon will change to a filled note icon (📄).

Step 5: Click the "Position" tab. Confirm that the provider indicated an intention to request privileges with their application and that the Privilege and Appointment Types were entered.

Step 6: Click the "Privileges" tab. Confirm that the provider requested privileges in at least one specialty.

Step 7: Click the "Documents" tab. Click <**Add**> to open the "Documents" screen and upload a document into the application. Be sure to select applicable "File Type" from the drop down menu and fill in a short description. Click <**Close**> when finished.

Step 8: Click the "Comments" tab. At least one comment record should be displayed. Click on the arrow to the left of the record line to access the hidden menu of actions. Click on "View Comment." [You can also access the comment by double-clicking on the selected record line.] After reading the comment, click <**Close**>.

Step 9: Click <**PSV**> at the bottom of the page. [This action may be accessed from any tab on the "Provider Application Review" page.] Select the "PSV by CC/MSSP/CM" radio button and click <**Submit**>. The work list will refresh with a new "Task = *Complete PSV*."

Step 10: Proceed directly to Lesson 5, or log off of CCQAS by clicking <**Logoff**> in the upper right corner of the screen.

END OF LESSON

LESSON 5: Primary Source Verification of the 1st E-Application

Background: After the CC/MSSP/CM has routed the e-application for PSV, one individual must take responsibility for the PSV task and perform all required PSV.

Objective: To practice accepting and completing the PSV for the 1st e-application for clinical privileges for a fictitious Provider.

Exercise:

Step 1: If you logged off of CCQAS at the end of Lesson 4, log on to CCQAS as the CC/MSSP/CM. Otherwise, skip this step.

Step 2: Double-click on the "Task = "*Complete PSV*" and take responsibility for PSV of the application by clicking <**Yes**>.

Step 3: Review the "Provider PSV Summary" tab. From the hidden menu for the "State License/Certification/Registration" section, select "Update." The record will open displaying all licensure information and a "PSV Information" portion of the screen. [Be sure to check whether the credential is "In Good Standing."] Enter the PSV information by first selecting the **Method** of PSV. Enter all required fields for the method selected. Click <**Save**>.

Step 4: Repeat Step 3 for each record in the following sections: "State License/ Certification/Registration," "National Certification/Registration," "Professional Education," "Post-Graduate Training," "Specialty," and "References." Select a different **Method:** of PSV for each record so that all methods are practiced. Note that only "Specialty" records where the Provider is board certified are required for PSV.

Step 5: Scroll down to the "NPDB/HIPDB/FSMB" portion of the "Provider PSV Summary" tab, just below the <Save> button. Enter a **Last Query Date** and results for an NPDB/HIPDB query and click <**Save**>.

> *Note:* If your facility or unit uses the "NPDB Batch Query" report to perform NPDB queries, this Provider's name will be included in the next batch query, if **Request Query** is checked. In this instance, the system will automatically populate the **Last Query Date**. The options for the "Adverse Information On File" section will have to be manually selected when the results of the query come back from the NPDB.

Step 6: Selecting one of the NPDB results options ("Adverse Information On File") will activate the <**Complete PSV**> button at the bottom of the screen. Click <**Complete PSV**>. A confirmation message will be returned. Click <**OK**>. The work list will refresh with a new "Task = *PSV Complete/Action Required*."

Step 7: Proceed directly to Lesson 6, or log off of CCQAS by clicking <**Logoff**> in the upper right corner of the screen.

END OF LESSON

This page intentionally left blank.

LESSON 6: Routing the 1st E-Application for Review

Background: After PSV has been completed, the e-application is returned to the CC/MSSP/CM, who then sets up the routing for review and approval of the application.

Objective: To practice setting up the routing for review and approval of the 1st e-application for a fictitious Provider.

Exercise:

Step 1: If you logged off of CCQAS at the end of Lesson 5, log on to CCQAS as the CC/MSSP/CM. Otherwise, skip this step.

Step 2: Double-click on the "Task = *PSV Complete/Action Required*." The application will open, displaying the "Provider Summary" tab.

Step 3: Click <**Routing**> at the bottom of the "Provider Summary" screen. The "Application Routing" screen is returned.

Step 4: Select a Level 1 Reviewer by clicking on one name in the **Available Reviewers** box**,** and clicking **[>]** to move the individual into the **Selected Reviewers** box.
Record the name of the selected Level 1 Reviewer: _____.

Step 5: Click **[+]** next to "Level 6 Reviewers" to open the section of the screen. Use the same process to select two Level 6 Reviewers who will review the e-application as Committee Members.
Level 6 Committee Member #1: _____.
Level 6 Committee Member #2: _____.

Step 6: Click [+] next to "Level 6 Committee Chair" to open the section of the screen. Select one Committee Chair to render the Committee's final recommendation on the application .
Level 6 Committee Chair: _____.

Step 7: From the pick list for Available PAs, select and record one name.
Privileging Authority: _____.

Step 8: Click <**Submit**>. The work list will refresh and no open tasks will be displayed.

Step 9: Log off of CCQAS by clicking <**Logoff**> in the upper right corner of the screen.

END OF LESSON

This page intentionally left blank.

LESSON 7: Level 1 Review of the 1st E-Application

Background: After the CC/MSSP/CM has submitted an application for routing, the assigned Level 1 Reviewer(s) will review and render a recommendation for approval of the requested privileges.

Objective: To practice receiving, reviewing, and endorsing the requested privileges on the 1st e-application for a fictitious Provider, as a Level 1 Reviewer.

Exercise:

Step 1: Log on to CCQAS as the Level 1 Reviewer (selected in Lesson 6): _____.

Step 2: Double-click on the "Task = *Application Ready for Review*." The application will open, displaying the "Privileges" tab. Click on the "Provider Summary" tab.

Step 3: Review each tab in the application. [Information entered on all tabs will be view- or read-only, with the exception of the "Privileges" tab which enables the Level 1 Reviewer to endorse each requested privilege item individually.]

Step 4: Click on the "Privileges" tab. Endorse each requested privilege item by selecting a value from the pick list under the "Level 1" column header. For the purposes of this lesson, please endorse each privilege item as requested by the Provider.

> *Note:* No endorsement is required by the Reviewer if the privilege item is "Not Supported" by the facility or unit or "Not Requested" by the Provider.

Step 5: After all endorsements have been entered, click <**Recommend**>. The "Reviewer Recommendation" screen will be returned.

Step 6: On the "Reviewer Recommendation" screen, enter text in the **Comments** box and click <**Submit**>. A warning message to verify completion of the task will be returned. Click <**OK**>. The work list will refresh and no open tasks will be displayed.

Step 7: Log off of CCQAS by clicking <**Logoff**> in the upper right corner of the screen.

END OF LESSON

This page intentionally left blank.

LESSON 8: Committee (Level 6) Review of the 1st E-Application

Background: After the Level 1 Reviewer has rendered a positive recommendation for the application, the assigned Level 6 Committee Members, and then the Level 6 Committee Chair, will review and render their recommendation for approval of the requested privileges.

Objective: To practice receiving, reviewing, and endorsing the requested privileges on the 1st e-application for a fictitious Provider, as various Members of a Committee.

Exercise:

Step 1: Log on to CCQAS as the first Level 6 Reviewer (selected in Lesson 6).
Level 6 Committee Member #1: _____.

Step 2: Double-click on the "Task = *Application Ready for Review*." The application will open, displaying the "Privileges" tab.

Step 3: Review each tab in the application. Information entered on all tabs will be view- or read-only, including the "Privileges" tab.

Step 4: Click on the "Comments" tab. Each application-level comment entered by the Provider, the CC/MSSP/CM [PSV Role], and the Level 1 Reviewer will be reflected on the "Comments" tab. To view a comment in detail, select "View Comment" from the hidden menu of actions for the comment record line. Click <**Close**> to return to the "Comments" screen.

Step 5: Click on the "Privileges" tab. Each privilege item will be view-only, displaying each privilege requested by the Provider and each endorsement rendered by the Level 1 Reviewer.

Step 6: After the application has been reviewed, click <**Recommend**>. The "Reviewer Recommendation" screen will be returned.

Step 7: On the "Reviewer Recommendation" screen, enter text in the **Comments** box and click <**Submit**>. A warning message to verify completion of the task will be returned. Click <**OK**>. The work list will refresh and no open tasks will be displayed.

Step 8: Log out of CCQAS by clicking <**Logoff**> in the upper right corner of the screen.

Step 9: Repeat Steps 1 – 8 for the second Level 6 Reviewer (selected in Lesson 6).
Level 6 Committee Member #2: _____.

Step 10: Log on to CCQAS as the Level 6 Committee Chair (selected in Lesson 6).
Level 6 Committee Chair: _____.

Step 11: Double-click on the "Task = *Application Ready for Review*." The application will open, displaying the "Privileges" tab.

Step 12: Review each tab in the application. Information entered on all tabs will be view- or read-only, including the "Privileges" tab.

Step 13: Click on the "Comments" tab. Each application-level comment entered by the Provider, the CC/MSSP/CM [PSV Role], the Level 1 Reviewer, and the other Level 6 Reviewers will be reflected on the "Comments" tab. To view a summary of the recommendations rendered to date, select "Recommendation Count" from the hidden menu of actions for <u>any</u> comment line. To close the "Recommendation Count" screen, click <**Close**>.

Step 14: After the application has been reviewed on the "Privileges" tab, click <**Recommend**>. [This can be done from <u>any</u> of the tabs at the top of the screen.] The "Reviewer Recommendation" screen will be returned.

Step 15: On the "Reviewer Recommendation" screen, enter text in the **Comments** box and click <**Submit**>. A warning message to verify completion of the task will be returned. Click <**OK**>. The work list will refresh and no open tasks will be displayed.

Step 16: Log off of CCQAS by clicking <**Logoff**> in the upper right corner of the screen.

END OF LESSON

LESSON 9: Privileging Authority Approval of the 1st E-Application

Background: After all assigned Reviewers and Committee Members have completed their review and rendered their recommendations for approval of the e-application, the Privileging Authority will review and render final approval of the requested privileges.

Objective: To practice receiving, reviewing, and approving the requested privileges on the 1st e-application for a fictitious Provider, as the Privileging Authority.

Exercise:

Step 1: Log on to CCQAS as the Privileging Authority (selected in Lesson 6).

Step 2: Double-click on the "Task = *Application Ready for Review*." The application will open, displaying the "Privileges" tab.

Step 3: Review each tab in the application. Information entered on all tabs should be view- or read-only, with the exception of the "Privileges" tab which enables the Privileging Authority to endorse each requested privilege item individually.

Step 4: Click on the "Comments" tab. Each application-level comment entered by the Provider, the CC/MSSP/CM [PSV Role], and all Reviewers should be reflected on the "Comments" tab. To view a summary of the recommendations rendered to date, select "Recommendation Count" from the hidden menu of actions for <u>any</u> comment line. To close the "Recommendation Count" screen, click <**Close**>.

Step 5: Click on the "Privileges" tab. Endorse each requested privilege item by selecting a value from the pick list under the column header "Privileging Authority." For the purposes of this lesson, please endorse each privilege item as requested by the Provider.

>   *Note:* No endorsement is required by the Privileging Authority if the privilege item is "Not Supported" by the facility or unit or "Not Requested" by the provider.

Step 6: After all endorsements have been entered, click <**Approve**>. The "Privileging Authority Decision" screen will be returned.

Step 7: On the "Privileging Authority Decision" screen, enter text in the **Comments** box and click <**Submit**>. A warning message to verify completion of the task will be returned. Click <**OK**>. The work list will refresh and no open tasks will be displayed.

Step 8: Log off of CCQAS by clicking <**Logoff**> in the upper right corner of the screen.

END OF LESSON

This page intentionally left blank.

LESSON 10: Routing the Notifications for the Approved E-Application

Background: After the e-application has been approved by the Privileging Authority, it is returned to the CC/MSSP/CM, who then sets up the routing for notification and acknowledgment of the approved privileges.

Objective: To practice setting up the routing for the notifications of approved privileges for a fictitious Provider.

Exercise:

Step 1: Log on to CCQAS as the CC/MSSP/CM.

Step 2: Double-click on the "Task = *PA Decision Complete/Action Required*." The application will open displaying the "Provider Summary" tab.

Step 3: Click <**Notifications**> at the bottom of the "Provider Summary" screen. The Notification Routing screen is returned.

Step 4: Set "**Notify Provider?** = *Yes*" and enter "**Acknowledgment Due (days)** = *0*."

Step 5: Select the Level 1 Reviewer (selected in Lesson 6) by clicking on the name in the **Available Reviewers** box, and clicking **[>]** to move the individual into the **Selected Reviewers** box.
Record the name of the selected Level 1 Reviewer: _____

> *Note:* The Provider is the only individual who receives a work list task as a result of being included in the notification routing. All Reviewers included in the notification routing will receive email notifications and task on their work list. Reviewers are not required to acknowledge the notification of awarded privileges or take any further action on the application (they only need to open the task and close it; the task will then disappear from their work list).

Step 6: Click <**Submit**>. The work list will refresh and no open tasks will be displayed.

Step 7: Log off of CCQAS by clicking <**Logoff**> in the upper right corner of the screen.

END OF LESSON

This page intentionally left blank.

LESSON 11: Acknowledging the Award of Clinical Privileges

Background: After the notification of approved privileges has been routed by the CC/MSSP/CM, the Provider receives a new task in the work list to acknowledge the approved privileges.

Objective: To practice acknowledging the award of clinical privileges as a fictitious Provider.

Exercise:

Step 1: Log on to CCQAS as the Provider whose 1st e-application was approved.
Provider: _____.

Step 2: Double-click on the "Task = *Privileging Notification (Military)* or *(Civilian)*."
The application will open, displaying the "Provider Summary" tab.   Examine the list of approved privileges by clicking on <**Here**> in the red notification message. When finished, click <**Close**>.

Step 3: The red notification message includes additional instructions on acknowledging the privileges granted by the Privileging Authority. Click <**Acknowledge**>. An "Acknowledgement" screen will be returned. This contains the type of privileges and medical staff appointment awarded, as well as statements about provider duties and responsibilities to comply with Service/MTF regulations and staff by-laws. The Provider may elect to accept or not accept the decision of the Privileging Authority by selecting one of two radio buttons on the screen.

> *Note:* The application process will proceed in the same manner, regardless of whether the Provider selects the **Accept** or the **I do not concur…** radio button. If the Provider chooses not to accept the Privileging Authority's decision and wants to submit an appeal, the appeal process is handled outside of the CCQAS system.

Step 4: Click <**Complete Acknowledgement**>. The work list will be refreshed and no open tasks will be displayed.

> *Note:* This is the last action taken by the Provider to complete the e-application process.

Step 5: Log off of CCQAS by clicking <**Logoff**> in the upper right corner of the screen.

END OF LESSON

This page intentionally left blank.

LESSON 12: Completing the E-Application Process

Background: After the Provider has acknowledged the approved privileges, the e-application is returned to the CC/MSSP/CM to accept the acknowledgement and complete the application process.

Objective: To practice accepting the acknowledgment of awarded privileges from a fictitious Provider, and to verify the import of the privilege information in the Provider's credentials record.

Exercise:

Step 1: Log on to CCQAS as the CC/MSSP/CM.

Step 2: Double-click on the "Task = *Privileging Acknowledgment Received*." The application will open displaying the "Provider Summary" tab.   The Provider's acknowledgment decision will be displayed in red text at the top of the page.

Step 3: Click <**Complete**> at the top of the "Provider Summary" tab. This action closes the processing of the application. The work list will refresh and no open tasks will be displayed.

Step 4: From the Credentialing main menu, select "Provider Search." The "Credentials Provider Search" screen will be returned. Click <**Search**> at the bottom of the screen to see a list of all credentialed Providers at your facility or unit.

Step 5: On the "Search Results" tab, open the credentials record for the Provider whose privilege application was approved in Step 3. Place your cursor on the Navigation bar to slide it out, and click on "Privileges" to access the "Privileges" section of the application. Move the cursor off of the Navigation bar to hide it.

Step 6: On the "Privileges" tab, one summary record will be displayed corresponding to the privileges awarded upon the approval of the 1st e-application. From the hidden menu of actions, click "View Privileges." The "Privileged Provider Information Report" will be returned, displaying the Provider's approved privileges. [This report can also be accessed by double-clicking on the summary record line.] Click <**Close**> to return to the "Privileges" tab.

Step 7: From the hidden menu of actions, click "Edit." The "Provider Position" screen will be returned, displaying the Provider's assignment information and the expiration dates for the awarded privileges. Change the **Privilege Expiration Date** to *the day after tomorrow*. Click <**Save**> to return to the "Privileges" tab.

Step 8: Place your cursor on the Navigation bar to slide it out and click "Assignments" to access the "Assignments" section of the application.   There will be one assignment record listed for the Provider's current assignment at this facility or unit. Open the

assignment record. Verify that the **Privilege Expiration Date** and **Staff Appointment Date** are view-only, but reflect the updated **Privilege Expiration Date** entered on the "Privileges" tab. Click <**Clos**e> to return to the "Assignments" tsb.

Step 9:   Review the remainder of the Provider's credentials record, using the Navigation bar to move among sections of the record.   The credentials record was populated using the information from the Provider's e-application, after the PSV was completed. When your review of the credentials record is complete, click <**Close Provider Record**> at the top of the screen.

Step 10: Log off of CCQAS by clicking <**Logoff**> in the upper right corner of the screen.

END OF LESSON

LESSON 13: Initiating and Completing an E-Application for Modification/Augmentation of Clinical Privileges

Background: CCQAS 2.8 enables a Provider to initiate a new application to modify/augment privileges that were granted during the processing of the most recent e-application.

Objective: To practice initiating, completing, and submitting an e-application for the modification/augmentation of current clinical privileges for a fictitious Provider.

Exercise:

Step 1: Log on to CCQAS as a Provider who holds currently approved privileges. The work list will have no open tasks.

Step 2: From the work list, click on the "Applications" tab. One summary record will be displayed, corresponding to the completed 1st e-application. From the hidden menu of actions, select "Request Modification." The "Application Modification Instructions" screen will be returned.

Step 3: Review the "Application Modification Instructions" screen, and click <**Initiate Modification**>. The Provider Modification Application will be displayed with instructions for completing the form.

Step 4: Review the information contained in each section of the Provider Modification Application. It will be pre-populated with the credentials information from the most recently approved privilege application. It will include any updates made to the Provider's credentials record since the last privilege application was approved.

> *Note:* The Provider may add new credentials information, but may not alter existing credentials that have already undergone PSV, except to update an expiration date (for a license renewal, certification renewal, etc.).

Step 5: Click on the "Continuing Education" section to document the completion of a new continuing education course by the provider. Click <**Add**>. Enter all required information for a new continuing education course. Click <**Save**>.

Step 6: Click on the "Practice History Questions" section. Respond to each question. Enter *Yes* for one of the questions, and click on the notes icon (🗋) to enter explanatory text. Click <**Save**>.

Step 7: Click on the "Health Status Questions" section. Respond to each question. Enter *Yes* for one of the questions, and click on the notes icon (🗋) to enter explanatory text. Click <**Save**>.

Step 8: Click on the "References" section. For the first reference listed, click "Update" from the hidden menu of actions and set **Current** = *Yes*. Click <**Save**>. Repeat this process to make current each of the references listed.

Step 9: Click on the "Privileges" section. The previously requested privileges will be displayed. Request an additional privilege that was not previously requested. Click <**Save**> to return to the "Privileges" tab. Check the bottom of the privilege list to ensure that the additional privilege is listed. Click <**Save**>.

Step 10: Click on the "E-Signature" section. Review the Attestation Statement and then enter the Provider's password to e-sign the application. Enter the comment, *Additional privileges are requested on the basis of a completed continuing education course*." Click <**I Agree**>. A warning message will be returned to review all sections of the e-application prior to e-signature. After review, click <**OK**>. A second message will be returned, indicating the application has been successfully submitted. Click <**OK**> to return to the work list. No open tasks will be displayed.

Step 11: Log off of CCQAS by clicking <**Logoff**> in the upper right corner of the screen.

END OF LESSON

LESSON 14: Reassigning an E-Application to and from Another CC/MSSP/CM

Background: A CC/MSSP/CM, who has already accepted responsibility for an application, may reassign the application to another CC/MSSP/CM in their facility or unit.

Objective: To practice reassigning an application for a fictitious Provider to another CC/MSSP/CM in the facility or unit, and then resuming responsibility for the application.

Note: The Modification Application will be used for this exercise.

Exercise:

Step 1: Log on to CCQAS as the CC/MSSP/CM.

Step 2: Review the work list to verify the presence of a task to "Task = *Application Ready for Review*" and "App Type = *Modification*." Double-click on the task.

Step 3: Take responsibility for processing the application by clicking <**Yes**>.

Step 4: Review the "Provider Summary" tab. Click <**Reassign CC/MSSP/CM**> at the bottom of the page. The "Reassign" screen will be returned. Open the pick list for **Available Users** and select another CC/MSSP/CM.
Record the selected CC/MSSP/CM here: _____.

Click <**Submit**>. A warning message will be returned. Click <**OK**>.

Step 5: Log off of CCQAS by clicking <**Logoff**> in the upper right corner of the screen.

Step 6: Log on to CCQAS as the CC/MSSP/CM to whom the application was reassigned. Review the Work list to verify the presence of the "Task = *Application Ready for Review*" and "App Type = *Modification*."

Step 7: Log off of CCQAS by clicking <**Logoff**> in the upper right corner of the screen.

Step 8: Log on to CCQAS as the original CC/MSSP/CM. Review the work list to verify that no open tasks are present.

Step 9: Click <**Application Reassignment**> at the bottom of the page. The "Application Reassignment" screen will be returned. Locate the summary record for the application for which you want to re-assume responsibility. From the hidden menu of actions for the record, select "Reassign to self." A warning message will be returned. Click <**OK**>. The work list will refresh and no open task will be displayed. Click <**Close**> to return to the work list to verify the "Task = *Application Ready for Review*," and "App Type = *Modification*."

Step 10: Proceed directly to Lesson 15, or log off of CCQAS by clicking <**Logoff**> in the upper right corner of the screen.

END OF LESSON

LESSON 15: Retrieving an E-Application During the Review Process

Background: It may be necessary for the CC/MSSP/CM to retrieve a privilege application from a Reviewer during the review process.

Objective: To practice retrieving from a Reviewer a privilege application that is currently in review.

Exercise:

Step 1: If you logged off of CCQAS at the end of Lesson 14, log on to CCQAS as the CC/MSSP/CM. Otherwise, skip this step.

> *Note:* In order to practice retrieving an application during the review process, you must first complete the PSV for the Modification Application and route it for review. Steps 2 – 8 pertain to this activity.

Step 2: Double-click on the "Task = *Application Ready for Review*." Click <**PSV**> at the bottom of the page. Select "PSV by CC/MSSP/CM" radio button and click <**Submit**>. The work list will refresh with a new "Task = *Complete PSV*".

Step 3: Double-click on the "Task = *Complete PSV*" and take responsibility for PSV of the application by clicking <**Yes**>. Perform the required PSV on the application, referring to Lesson 5, as necessary. When all required PSV has been completed, click <**Complete PSV**> at the bottom of the screen. A confirmation message will be returned. Click <**OK**>. The work list will refresh with a new "Task = *PSV Complete/Action required.*"

Step 4: Double-click on the "Task = *PSV Complete/Action Required.*"   The application will open, displaying the "Provider Summary" tab.

Step 5: Click <**Routing**> at the bottom of the "Provider Summary" screen. The Application Routing screen will be returned.

Step 6: Select a Level 1 Reviewer by clicking on one name in the **Available Reviewers** box, and clicking **[>]** to move the individual into the **Selected Reviewers** box. Record the name of the selected Level 1 Reviewer: _____.

Step 7: From the pick list for Available PA's, select and record one name. Privileging Authority: _____.

Step 8: Click <**Submit**>. The work list will refresh and no open tasks will be displayed.

Step 9: Log off of CCQAS by clicking <**Logoff**> in the upper right corner of the screen.

Step 10: Log on to CCQAS as the Level 1 Reviewer (selected in Step 6). Verify that the Level 1 Reviewer has the "Task = *Application Ready for Review*" in the work list.

Step 11: Log off of CCQAS by clicking <**Logoff**> in the upper right corner of the screen.

Step 12: Log on to CCQAS as the CC/MSSP/CM.

Step 13: On the work list tab, open the pick list for **User:** located in the header portion of the tab on the right side of the screen. Select the Reviewer's name that currently has custody of the application you wish to retrieve. The individual's work list will be displayed.

Step 14: Open the task on the Reviewer's work list that corresponds to the application you want to retrieve. The "Privileges" tab will be returned. Click on <**Return w/out Action**> located at the bottom of the screen. The "Reviewer Recommendation" screen will be returned. Enter the comment, "*This application is being withdrawn by the CC/MSSP/CM*" and click <**Submit**>. A warning message will be returned. Click <**OK**>. The work list for the CC/MSSP/CM will be returned with the "Task = *Application Returned/Action Required*."

Step 15: On the work list tab, open the pick list for **User:** = Level 1 Reviewer selected in Step 6. Verify the "*Task = Application Returned for Review*" is no longer displayed in the Reviewer's work list.

Step 16: Log off of CCQAS by clicking <**Logoff**> in the upper right corner of the screen.

END OF LESSON

LESSON 16: Rerouting an E-Application During the Review Process

Background: It may be necessary for the CC/MSSP/CM to reroute a privilege application during the review process. The application may be routed back to the same Reviewer to allow a second review of the application, or it may be routed to a new Reviewer.

Objective: To practice rerouting a privilege application that has been returned to the CC/MSSP/CM.

Exercise:

Step 1: Log on to CCQAS as the CC/MSSP/CM.

> *Note:* In order to reroute an e-application, the CC/MSSP/CM must have custody of the application as an active task in the work list.

Step 2: Double-click on the "Task = *Application Returned/Action Required*." The application will open, displaying the "Comments" tab.

Step 3: Click <**Routing**> at the bottom of the "Comments" screen. [This action may be accessed from <u>any</u> other tab on the "Provider Application Review" screen.] The "Application Routing" screen is returned. The previously assigned Reviewers will be shown in the **Selected Reviewers** box.

Step 4: Change the Level 1 Reviewer by clicking on one name in the **Available Reviewers** box, and clicking **[>]** to move the individual into the **Selected Reviewers** box. Remove the previously-assigned Level 1 Reviewer by clicking on the name in the **Selected Reviewers** box, and clicking **[<]** to move the individual into the **Available Reviewers** box.
Record the name of the new Level 1 Reviewer: _____.

Step 5: Ensure the radio button for Route to Level 1 Reviewer has been selected. Click Submit. The work list will refresh and no open tasks will be displayed.

Step 6: Log off of CCQAS by clicking <**Logoff**> in the upper right corner of the screen.

END OF LESSON

This page intentionally left blank.

LESSON 17: Changing a Privilege Endorsement as a Level 1 Reviewer

Background: During the Level 1 review of an e-application, the Reviewer has the capability to enter an endorsement for a privilege item that differs from that which the provider requested. When this occurs, the e-application will automatically be returned to the CC/MSSP/CM, instead of being advanced to the next level of review.

Objective: To practice the endorsement of a privilege item that differs from that which the Provider requested.

Exercise:

Step 1: Log on to CCQAS as the Level 1 Reviewer who was assigned to review the e-application in Lesson 16: _____.

Step 2: Double-click on the "Task = *Application Ready for Review*." The application will open, displaying the "Privileges" tab.

Step 3: Endorse each requested privilege item by selecting a value from the pick list under the "Level 1" column header. Identify the new privilege that the Provider is requesting as a result of completing a continuing education course. Select a privilege level that is different from that which the provider requested. The "Reviewer Comment" screen will be returned. A comment supporting the change is required. Enter a comment and click <**Save**>.

Step 4: Click on the empty note icon (🗋) for the changed privilege item and enter the comment, "*Training course is not sufficient for competency*." Once a note is added, a filled note icon (🗒) will display.

Step 5: After all endorsements have been entered, click <**Recommend with Modification**>. The "Reviewer Recommendation" screen will be returned.

> *Note*: The <**Recommend**> option is no longer active if the Reviewer has entered one or more privilege endorsements that differ from that which the Provider requested.

Step 6: On the "Reviewer Recommendation" screen, enter text in the **Comments** box and click <**Submit**>. A warning message will be returned. Click <**OK**>. The work list will be refreshed and no open tasks will be displayed.

Step 7: Log off of CCQAS by clicking <**Logoff**> in the upper right corner of the screen.

END OF LESSON

This page intentionally left blank.

LESSON 18: Terminating an E-Application

Background: A CC/MSSP/CM may find it necessary to terminate the processing of an e-application. This would be appropriate in situations where the e-application was submitted in error, or the Provider, the Privileging Authority, or some other entity no longer wishes to have the application processed.

Objective: To practice terminating an e-application for a fictitious Provider.

> *Note:* In the context of this training activity, the e-application is being terminated because the Reviewer does not believe that the additional training entered on the Modification Application provides adequate justification for the award of additional privileges. The decision to terminate would, most likely, be made outside the CCQAS application, via communications among the Provider, the Level 1 Reviewer, and the CC/MSSP/CM.

Exercise:

Step 1: Log on to CCQAS as the CC/MSSP/CM.

Step 2: Double-click on the "Task = *Application Returned/Action Required*." The application will open displaying the "Comments" tab.

Step 3: Click <**Terminate**> at the bottom of the screen. [This action may be accessed from <u>any</u> tab on the "Provider Application Review" screen.] A "Terminate Workflow Reason/Comments" box will be returned. Enter a reason for terminating the application. A warning message will be returned requesting confirmation of the intent to terminate the application and end the routing process. Click <**YES**>. The work list will refresh and no open tasks will be displayed.

> *Note:* A complete audit trail of the terminated application will be retained in CCQAS and may be accessed from the "My Applications" tab.

Step 4: Log off of CCQAS by clicking <**Logoff**> in the upper right corner of the screen.

END OF LESSON

This page intentionally left blank.

LESSON 19: Requesting an ICTB at the Gaining Facility or Unit

Background: CCQAS 2.8 enables a CC/MSSP/CM at the gaining facility or unit to request an ICTB transaction be initiated for the Provider, using the Broadcast Messages function.

Objective: To practice requesting an ICTB for a fictitious Provider.

Exercise:

Step 1: Log on to CCQAS as the gaining facility or unit CC/MSSP/CM, using the userid and password supplied to you. (For this exercise, swap CC/MSSP/CM userid and password with a neighbor who is using a UIC different than yours):
_____.

Step 2: From the Credentialing main menu, select "Provider Search." The "Credentials Provider Search" screen will be returned. Enter your provider's **Last Name** and **First Name**, select the **Provider Locator** radio button [located in the Action section on the right-hand side of the screen]. Click **<Search>**.

Step 3: On the "Provider Locator" tab, identify your Provider from among the list of Providers. From the hidden menu of actions for the Provider, click "Request ICTB." A "Broadcast Message" window will display.

Step 4: Enter *today's date* as the **ICTB Begin Date:** and *seven days from today's date* as the **ICTB End Date:** and click <**Send**>. A confirmation message will be returned, indicating that the request was sent. Click <**OK**>.

> *Note:* As a result of this action, the system will send a "Broadcast Message" to the sending (parent) facility or unit. The responsibility for initiating the ICTB transaction still remains with the sending (parent) facility or unit.

Step 5: Log off of CCQAS by clicking <**Logoff**> in the upper right corner of the screen.

END OF LESSON

This page intentionally left blank.

LESSON 20: Initiating an ICTB Transaction at the Sending (Parent) Facility or Unit

Background: The CC/MSSP/CM at the sending unit is still responsible for initiating the ICTB transaction

Objective: To practice receiving a Broadcast Message with a request for an ICTB and initiating an ICTB transaction for a fictitious Provider.

Exercise:

Step 1: Log on to CCQAS as the sending (parent) facility or unit CC/MSSP/CM. A message window should display alerting you to a new, incoming Broadcast Message. Sending (parent) facility or unit: _____.

Step 2: From the "System" main menu, select "Broadcast Messages." The message is displayed in the bottom portion of the screen, in the "View Message/Broadcast Message" section. Review the message and click <**Close**> to return to the work list.

Step 3: From the Credentialing main menu, select "Provider Search." The "Credentials Provider Search" screen will be returned. Enter your provider's **Last Name** and **First Name,** select the **Search** radio button in the "Action" section of the screen, and click <**Search**>.

Step 4: On the "Search Results" tab, click "Initiate ICTB" from the hidden menu of actions for the Provider's credentials record. The "Initiate ICTB" screen will be returned. Enter the **To Command:** *UIC*, *today's date* as the **Start Date**, and *seven* days *from today's date* as the **End Date**. You may include other relevant information you deem necessary. Click <**Submit**> to initiate the ICTB transaction.

> *Note:* The process of initiating the ICTB transaction in CCQAS 2.8 is the same as it was in CCQAS 2.7. The initiation of the ICTB in CCQAS 2.8, however, will trigger the generation of the ICTB privilege application for the Provider.

Step 5: The system will return the ICTB letter set-up window. Select from three additional text options for Paragraph 11 of the letter and any additional comments (if any) for Paragraph 12, and click <**Submit**> or <**Generate Letter**>.

Step 6: Review the ICTB letter for completeness and click <**Close**> at the top of the screen.

Step 7: Log off of CCQAS by clicking <**Logoff**> in the upper right corner of the screen.

END OF LESSON

This page intentionally left blank.

LESSON 21: Completing the ICTB Application

Background: The CC/MSSP/CM at the sending (parent) facility or unit is still responsible for initiating the ICTB transaction

Objective: To practice completing an application for ICTB privileges as a fictitious Provider.

Exercise:

Step 1: Log on to CCQAS as the Provider for whom an ICTB transaction was initiated in Lesson 20: _____.

Step 2: Review the work list to verify the "Task = *Complete Application (Military)*" and "App Type = *Transfer (ICTB)*." Double-click on the task to open the application form.

Step 3: Review the on-screen instructions for completing the ICTB Application. The ICTB Application will be pre-populated with the current information from the Provider's credentials record.

> *Note:* The Provider's ability to enter new credentials information into the ICTB application is limited to updates and additions in the Licensure/Certification/ Registration screen.

Step 4: Click on "Practice History Questions" on the Navigation bar. Respond to each question. Enter *Yes* for one of the questions, and click on the notes icon (🗋) to enter explanatory text. Click <**Save**> at the top of the screen.

Step 5: Click on "Health Status Questions" on the Navigation bar. Respond to each question. Enter *Yes* for one of the questions, and click on the notes icon (🗋) to enter explanatory text. Click <**Save**> at the top of the screen.

Step 6: Click on "References" on the Navigation bar. For the first reference listed, click "Update" from the hidden menu of actions and set **Current** = *Yes*. Click <**Save**>. Repeat this process to make current each of the references listed.

Step 7: Click on "Privileges" on the Navigation bar. The previously requested privileges will be displayed. The same privileges should be requested for the ICTB duty when all appropriate privileges have been requested. Click <**Save**>.

Step 8: Click on "E-Signature" on the Navigation bar. E-sign and submit the application by clicking <**I Agree**>. A caution message to review the application will be returned. Click <**OK**>. A confirmation message will be returned. Click <**OK**>. The work list will refresh and no open tasks will be displayed.

Step 9: Log off of CCQAS by clicking <**Logoff**> in the upper right corner of the screen.

Step 10: Log on to CCQAS as the gaining unit CC/MSSP/CM using the userid and password supplied to you: _____.

Step 11: Review the work list to verify the "Task = *Application Ready for Review*" and "App Type = *Transfer (ICTB)*." Double-click on the task to open the application form. Take responsibility for processing the application by clicking <**Yes**>. Review all tabs of the application form. When finished, click <**Close**>.

Step 12: Log off of CCQAS by clicking <**Logoff**> in the upper right corner of the screen.

END OF LESSON

LESSON 22: Canceling the ICTB E-Application

Background: The CC/MSSP/CM at the sending (parent) facility or unit may cancel an ICTB transaction at any time during the ICTB duty period if the ICTB duty does not actually take place.

Objective: To practice canceling an ICTB transaction for a fictitious Provider.

Exercise:

Step 1: Log on to CCQAS as the sending (parent) facility or unit CC/MSSP/CM.
Sending (parent) facility or unit CC/MSSP/CM: _____

Step 2: From the Credentialing main menu, select "Provider Search". The "Credentials Provider Search" tab will be returned. Enter your provider's **Last Name** and **First Name**, ensure the **Search** radio button has been selected, and click **<Search>**.

Step 3: On the "Search Results" tab, click "Cancel ICTB" from the hidden menu of actions for the Provider's credentials record. A warning message will be returned. Confirm your intent to cancel this ICTB transaction by clicking <**OK**>.

>   *Note:* The process of canceling the ICTB transaction in CCQAS 2.8 is the same as it was in CCQAS 2.7. The cancellation of the ICTB in CCQAS 2.8, however, will close all active work list tasks associated with the application.

Step 4: Proceed directly to Lesson 23, or log off of CCQAS by clicking <**Logoff**> in the upper right corner of the screen.

END OF LESSON

This page intentionally left blank.

LESSON 23: Configuring Command Parameters to Generate Renewal Applications

Background: As a Provider's privilege expiration date approaches, a new application for renewal of clinical privileges must be submitted. The CC/MSSP/CM at the current facility or unit determines how far in advance of the expiration date that the renewal application is generated.

Objective: To practice configuring the "Command Parameters" screen to determine when CCQAS should generate the Renewal Application for the Provider.

Exercise:

Step 1: If you logged off of CCQAS at the end of Lesson 22, log on to CCQAS as the CC/MSSP/CM. Otherwise, skip this step.

Step 2: From the Credentialing main menu, select "Provider Search". The "Credentials Provider Search" tab will be returned. Enter your Provider's **Last Name** and **First Name**, ensure the **Search** radio button has been selected, and click **<Search>**.

Step 3: On the "Search Results" tab, open the credentials record for the Provider. Open the Navigation bar and click "Privileges" to access the "Privileges" section of the application.

Step 4: In the "Privileges" section, one summary record will be displayed which corresponds to the privileges awarded upon the approval of the 1st e-application. From the hidden menu of actions, click "Edit." The "Provider Position" screen will be returned displaying the Provider's assignment information and the expiration dates for the awarded privileges. Change the **Privilege Expiration Date** to the day after tomorrow. Click <**Save**> to return to the "Privileges" tab.

Step 5: Click <**Close Provider Record**> at the top to return to the "Search Results" tab.

Step 6: From the "System" main menu, select "Command Parameters." Enter **Renewal Notice Days** = 2. [This parameter option is located under "Privileging Authority" on the upper right portion of the screen.] Click <**Save**> and then <**Close**>.

>   *Note:* CCQAS will run a nightly batch to auto-generate the Renewal Applications at the appropriate time. The Renewal Application for your Provider will auto-generate tonight and be available as a new task in the Provider's work list tomorrow.

>   *Note:* The one number entered for the "Renewal Notice Days" field will work for both initial and regular appointments. For example, if you set the "Renewal Notice Days" at 30, the system will search every night for records with a "Privilege Expiration Date" due in a month.

Step 7: Log off of CCQAS by clicking <**Logoff**> in the upper right corner of the screen.

END OF LESSON

LESSON 24: Routing the Performance Assessment Report (PAR)

Background: A Performance Assessment Report (PAR) should be completed to reflect the Provider's performance over the most recent privileging period. CCQAS supports the automated generation of an online PAR as part of the privilege renewal, the ICTB, or the PCS processes.

Objective: To practice routing the CCQAS-generated, online PAR to the PAR Evaluator who will be responsible for completing and submitting the PAR for a fictitious Provider.

Exercise:

Step 1: Log on to CCQAS as the CC/MSSP/CM.

Step 2: Double-click on the "Task = *Setup PAR*" on the work list. The application will open, displaying the "PAR Routing" screen.

Step 3: Examine the information in the upper portion of the "PAR Routing" screen. The **Period of Evaluation** will reflect the privileging period associated with the 1st e-application. The **Purpose of Evaluation** will default to *Renewal of Staff Appointment/Privileges*, since this PAR task was generated by a renewal action. Both fields may be edited.

Step 4: Ensure that the radio button for **Electronic PAR** is selected.

Step 5: Assign one individual to complete the PAR by selecting a name from the pick list for **Par Evaluator**. Record the selected PAR Evaluator: _____

> *Note:* The assignment of one or more PAR Reviewers to review the PAR generated by the PAR Evaluator is optional, and should be performed in accordance with Service policy.

Step 6: Click <**Submit**>. The work list will refresh and no open tasks will be displayed.

Step 7: Log off of CCQAS by clicking <**Logoff**> in the upper right corner of the screen.

END OF LESSON

This page left intentionally blank.

LESSON 25: Completing the Performance Assessment Report (PAR) – The PAR Evaluator Role

Background: The assigned PAR Evaluator completes the online PAR to reflect the Provider's performance over the most recent privileging period.

Objective: To practice completing the online PAR for a fictitious Provider, as the PAR Evaluator role.

Exercise:

Step 1: Log on to CCQAS as the PAR Evaluator assigned in Lesson 24: _____.

Step 2: Double-click on the "Task = *Complete PAR*" on the work list. The application will open, displaying the "Profile" tab of the "Performance Assessment Report" screen.

Step 3: Examine the information on the "Profile" screen. The **Period of Evaluation** and **Purpose of Evaluation** will reflect the information submitted by the CC/MSSP/CM during the routing of the PAR.

> *Note:* The PAR Evaluator may navigate among different sections of the application by clicking the vertical Navigation bar along the left side of the screen.

Step 4: Open the Navigation bar and select the "Privileges Evaluated."

> *Note:* In Army facilities or units, PAR Evaluators should indicate their assessment of the Provider's performance for each privilege granted to the Provider. PARs performed at Air Force facilities or units will reflect a view-only list of the privileges under evaluation. Since the Navy has core privileging, PARs at Navy facilities or units will require the Evaluator to do a general assessment for the core set of privileges, and an assessment of each of the supplemental privileges.

Step 5: Open the Navigation bar and select "Quality Management Measures."

Step 6: Click <**Add**> to add a measure. Select a measure **Type** and enter all required information, and click <**Save**> at the top of the screen. Repeat this step twice more to enter different measure **Types**.

> *Note:* In general, if "**Practice/Care within standards?** = *No*" is entered for any of the documented measures, comments are required.

Step 7: Open the Navigation bar and select "Facility-Wide Measures."

Step 8: Click <**Add**> to add a measure. Select a **Measure Type** and enter all required information, and click <**Save**>. Repeat this step twice more to enter different **Measure Types**.

Note: The Facility-Wide Measures will depend on the measures being monitored over the period of evaluation or those standard measures designated for performing PARs.

Step 9: Open the Navigation bar and select "Practice Volume." Enter data into each of the metrics on the screen. CCQAS will automatically sum the **Total Number of Procedures** and the **Total Number of Days Unavailable** as the PAR Evaluator enters a value for the individual metrics.

Note: The "Quality Management Measures" and "Practice Volume" metrics will differ, depending upon practitioner type and specialty of the Provider under review.

Step 10: Open the Navigation bar and select "Professional Development." This section is pre-populated using data from the Provider's credentials record. Enter the number of papers published, presentations given, etc. in the center of the screen, as well as any pertinent supporting comments, and click <**Save**>.

Step 11: Open the Navigation bar and select "Clinical/Technical Performance Questions." Enter *Unsatisfactory* for one question. Add an explanatory comment for any item by clicking on the empty note icon (🗋). Once a comment is added, the empty note icon (🗋) will become a filled note icon (🗎). Mark all remaining items as *Satisfactory*, and click <**Save**>.

Step 12: Open the Navigation bar and select "Personal Evaluation Questions." Enter *No* to all questions and click <**Save**>. Note that a comment is required for a *No* response to Question 2.   Change the *No* response to *Yes* and click <**Save>**.

Step 13: Open the Navigation bar and select "Documents." All documents associated with the privilege application on which the PAR evaluation period is based, will be viewable in the "Documents" section.

Step 14: Open the Navigation bar and select "PAR Summary (PDF)." A pdf file of the PAR Summary will be returned. Close the pdf form.

Step 15: Open the Navigation bar and select "PAR Summary." A view-only, on-screen version of the PAR containing all information that was entered to date by the PAR Evaluator will be returned.

Step 16: Open the Navigation bar and select "E-Signature." Enter an overall assessment of the Provider's performance and any supporting comments, and then click <**Submit**> to complete the PAR task. A warning message will be returned asking the Evaluator to review all sections of the PAR prior to e-signature. After review, click <**OK**>. The work list will refresh and no open tasks will be displayed.

Note: The PAR Evaluator's completion and submission of the PAR is required in order for a Renewal or PCS application to be routed and reviewed.

Step17: Log off of CCQAS by clicking <**Logoff**> in the upper right corner of the screen.

END OF LESSON

This page intentionally left blank.

LESSON 26: Reviewing the Performance Assessment Report (PAR) – The Provider Role

Background: Once the assigned PAR Evaluator completes and submits the online PAR, CCQAS notifies the Provider that a view-only copy of the PAR is available for review and acknowledgement.

Objective: To practice reviewing and acknowledging a completed, online PAR as a fictitious Provider.

Exercise:

Step 1: Log on to CCQAS as the Provider whose performance was assessed in Lesson 25: _____.

> *Note*: If any PAR Reviewers were assigned to review the PAR, the Provider and the PAR Reviewer(s) will receive a "Task = *Review PAR*" simultaneously.

Step 2: Double-click on the "Task = *Review PAR*" on the work list. The application will open to the "Profile" section of the "Performance Assessment Review Form."

Step 3: Review the PAR. All information entered by the PAR Evaluator will be viewable by the Provider.

> *Note:* The Provider may navigate among different view-only sections of the PAR by clicking the vertical Navigation bar along the left side of the screen.

Step 4: Open the Navigation bar and click on "E-Signature." On the "E-Signature" screen, the overall evaluation and comments rendered by the PAR Evaluator will be displayed. Enter some optional comments in a second **Comments** box screen, and then click <**Submit**>. A warning message will be returned. Click <**OK**>. The work list will refresh and no open tasks will be displayed.

> *Note:* The Provider's acknowledgment of the PAR is not required in order for a Renewal or PCS application to be routed and reviewed.

Step 5: Log off of CCQAS by clicking <**Logoff**> in the upper right corner of the screen.

END OF LESSON

This page left intentionally blank.

LESSON 27: Completing the Renewal Application

Background: After CCQAS has generated the Renewal Application, the Provider completes and submits an e-application requesting a renewal of privileges at the same facility or unit.

Objective: To practice completing and submitting an e-application for the renewal of clinical privileges for a fictitious Provider.

Exercise:

Step 1: Log on to CCQAS as a Provider.

Step 2: Review the work list to verify the presence of a "Task = *Complete Application* (*Military*) or (*Civilian*)" and "App Type = *Renewal*." Double-click on the task to open the application form.

Step 3: Review the information contained in each section of the Renewal Application. It will be pre-populated with current credentials information from the Provider's credentials record, including the continuing education entered after the PSV of the Modification Application.

Step 4: Click on "Lic/Cert/Reg" on the Navigation bar. Click <**Add**> to enter a second state license.   Enter the required information and click <**Save**>.

Step 5: Click on "Practice History Questions" on the Navigation bar. Respond to each question. Enter *Yes* for one of the questions, and click on the notes icon (🗋) to enter explanatory text. Click <**Save**>.

Step 6: Click on "Health Status Questions" on the Navigation bar. Respond to each question. Enter *Yes* for one of the questions, and click on the notes icon (🗋) to enter explanatory text. Click <**Save**>.

Step 7: Click on "References" on the Navigation bar. For the first reference listed, click "Update" from the hidden menu of actions and set **Current** = *Yes*.   Click <**Save**>. Repeat this process to make current, each of the references listed.

Step 8: Click on "Privileges" on the Navigation bar. The previously requested privileges will be displayed. Request the same privileges that were requested on the 1st e-application.

Step 9: Click on "E-Signature" on the Navigation bar. Review the "Attestation Statement" and then enter the Provider's password to e-sign the application. Click <**I Agree**>. A warning message will be returned asking the Provider to review all sections of the e-application prior to e-signature. After review, click <**OK**>. A second message will be returned, indicating that the application has been submitted successfully. Click <**OK**>.

Step 10: Log off of CCQAS by clicking <**Logoff**> in the upper right corner of the screen.

END OF LESSON

LESSON 28: Receipt, PSV, and Routing of the Renewal Application

Background: After the Provider has submitted the Renewal Application, the CC/MSSP/CM receives the application and routes it for PSV and review.

Objective: To practice receipt, PSV, and routing of the Renewal Application for a fictitious Provider.

Exercise:

Step 1: Log on to CCQAS as a CC/MSSP/CM.

Step 2: Review the work list to verify the presence of a "Task = *Ready for Review*" and "App Type = *Renewal*." Double-click on the task to open the application form.

Step 3: Take responsibility for processing the application, by clicking <**Yes**>.

Step 4: Click <**PSV**> and select "PSV by CC/MSSP/CM" radio button. The work list will refresh with a new "Task = *Complete PSV*."

Step 5: Double-click on "Task = *Complete PSV*" and take responsibility for PSV of the application by clicking <**Yes**>. PSV the application, referring to Lesson 5, as necessary. When all required PSV has been completed, click <**Complete PSV**> at the bottom of the screen. The work list will refresh with a new "Task = *PSV Complete/Action Required.*"

Step 6: Double-click on the "Task = *PSV Complete/Action Required.*" The application will open, displaying the "Provider Summary" tab. Click <**Routing**> at the bottom of the "Provider Summary" screen. The "Application Routing" screen will be returned.

Step 7: Select a Level 1 Reviewer by clicking on one name in the **Available Reviewers** box, and clicking [**>**] to move the individual into the **Selected Reviewers** box.
Record the name of the selected Level 1 reviewer: _____.
Assign Reviewers at other Levels of review, as desired: _____.

Step 8: From the pick list for Available PA's, select and record one name.
Privileging Authority: _____.

Step 9: Click <**Submit**>. The work list will refresh and no open tasks will be displayed.

Step 10: Log off of CCQAS by clicking <**Logoff**> in the upper right corner of the screen.

END OF LESSON

This page intentionally left blank.

LESSON 29: Adding the Reviewer Role to a Provider's User Account

Background: Over time, Providers may also need to have access to CCQAS as a Reviewer, PAR Evaluator, or other role in CCQAS. The CC/MSSP/CM can modify the Provider's user account to grant additional role-based access to the Provider.

Objective: To practice modifying the user account for a fictitious Provider to grant access to CCQAS as a Reviewer.

Exercise:

Step 1: Log on to CCQAS as a CC/MSSP/CM.

   Note: In this exercise, we will assume that the CC/MSSP/CM has already been informed of Provider's need to function as a CCQAS Reviewer.

Step 2: From the "System" main menu, select "User Processing." The "User Listing" screen is returned.

Step 3: On the "User Listing" screen, only Reviewers, PAR Evaluators, and other users of the CCQAS modules are displayed. To locate the existing Provider's user account, click <**Search User>**. Check the **Include Provider Users** checkbox, enter the Provider's **Last Name,** and click <**Submit**>. The "User Listing" screen will refresh displaying all existing user accounts at the facility or unit that meet the search criteria.

Step 4: Double-click on the user account for the Provider. Click on the "MTF" tab.

Step 5: Click <**Add** [*UIC*]**>** at the top of the screen. This action will automatically create a UIC record in the upper portion of the screen, indicating that access to the CCQAS modules has been given to the Provider's account.

Step 6: Click on the "Permissions" tab and then click the "Privileging" tab. Select the *Yes* radio button for **Privileging Module** and **Reviewer**. Click <**Save**> and then <**Close**>.

   Note: Other roles and permissions may be assigned to the user's account, as appropriate.

Step 7: Click <**Close**> to close the User Listing. The Provider will now have access to CCQAS as a Reviewer.

Step 8: Log off of CCQAS by clicking <**Logoff**> in the upper right corner of the screen.

END OF LESSON

This page intentionally left blank.

Lesson 30: Configuring Facility-Supported Privileges

Background: Prior to using CCQAS 2.8 electronic privileging functions at your facility or unit, the complete list of privileges supported by the facility or unit must be configured.

Objective: To configure the facility- or unit-supported privileges for each specialty.

Exercise:

Step 1: Log on to CCQAS as a CC/MSSP/CM.

Step 2: Click on the "Privileging" main menu and select "Privilege Management."

Step 3: On the "MTF Privilege Management" screen, open the pick list for "Privilege Category" and click on the first specialty that will be configured. The screen will refresh and display the privilege list for the selected specialty.

   Note: Since the default setting for all privileges in every specialty is "Not Supported," specialties that are not supported at your facility or unit do not require any configuration.

Step 4: Configure the privileges that <u>are</u> supported under the selected specialty by clicking the corresponding radio button for "Supported."

   Note: All privilege items in one folder may be simultaneously designated as supported by clicking the header labeled "<u>Supported</u>." Individual items may then be deselected by clicking the radio button under "<u>Not Supported</u>."

Step 5: After all privilege items have been reviewed and configured for the selected specialty, click <**Save>**.

Step 6: Repeat Steps 3 – 5 for every specialty that is supported at your facility or unit. Continue this process until all supported privileges have been configured.

Step 7: Click <**Close**> on the "MTF Privilege Management" screen.

Step 8: Log off of CCQAS by clicking <**Logoff>** in the upper right corner of the screen.

END OF LESSON

This page intentionally left blank.

Lesson 31: Processing a Request for a New User Account

Background: At the conclusion of Day 1 of this training, a member of your medical service staff registered for the user account in CCQAS. The online registration form needs to be processed in order to create the new user account.

Objective: To process the request for a new user account for a member of the medical staff at your facility or unit in CCQAS 2.8.

Exercise:

Step 1: Log on to CCQAS 2.8 as a CC/MSSP/CM. During the log on, a message will be returned indicating that a new applicant is waiting to be processed.

Step 2: From the "System" main menu, select "Applicant Processing." The "Applicant Listing" screen will be returned.

Step 3: Select "Process" from the hidden menu of actions for the applicant's record. The "User Application" screen will be returned displaying the information submitted by the applicant.

Step 4: Click <**Process**> at the bottom of the screen. A message that a new user account has been added to CCQAS will be returned. Click <**OK**>.

Step 5: The "Update User" screen will be returned, displaying the "Demographics" tab. The "Demographics" tab will be used in the future to update the user's personal information, to lock and unlock the user's account, and to issue new passwords to the user as necessary.

Step 6: Click on the "MTF" tab. The upper portion of the "MTF" tab reflects the UIC where the user has been granted access to CCQAS (in Step 4 above). This record was automatically created by CCQAS when the user was granted access to CCQAS. If the user is granted access to CCQAS at more than one facility or unit, multiple UICs will be displayed here.

   Note: Service-level personnel will perform the user management of accounts for individuals who require access to CCQAS at multiple facilities or units.

Step 7: Click on the "Permissions" tab and then click the "Privileging" tab. Select the *Yes* radio button for **Privileging Module** and **Reviewer**. Other roles and permissions may be assigned to the user's account now or at a future date, if appropriate. Click <**Save**> and then <**Close**>.

   Note: The selection of Privileging module ensures that the user will have the "Privileging" module on the main menu in their CCQAS view.

Step 8: Click <**Close**> to close the user's account. The staff member will now have access to CCQAS as a Reviewer.

Step 9: Log out of CCQAS by clicking <**Logoff**> in the upper right corner of the screen.

END OF LESSON

Notes